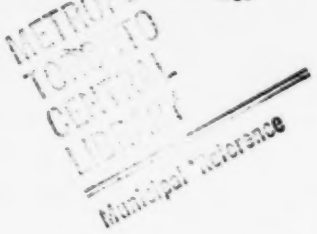
2.

The Municipality of Metropolitan Toronto

Metropolitan Community Services Department

Policy and Planning Division



January 29, 1985

To: Community Services and Housing Committee

Origin: Commissioner of Community Services

Subject: Review of Grant Policy for Social Planning Organizations

Background

Metropolitan Council at its meeting on March 15, 1983, adopted a report establishing funding policies and eligibility criteria for the social planning support component of the Metropolitan Toronto social services grants program. Specific policies and criteria were established for the provision of grants to local social planning organizations. These funding policies included that the Metropolitan contribution would not exceed a maximum of $10,000.00 per organization, and that this grant ceiling would be reviewed by Metropolitan Council from time to time. A commitment was made to have the first review conducted after the 1984 grant cycle.

The Department of Community Services has completed the required undertaking. This report provides a brief description of the review process and outlines the findings from the review.

Review Process

The review was conducted during the fall of 1984 and involved discussions with local social planning organizations and with the Social Planning Council of Metropolitan Toronto (Metro SPC). In summary, the review included:

- an examination of the respective roles of local and Metropolitan-wide social planning organizations to determine whether or not continued funding for organizations at both levels is warranted;

- a review of the programs and services delivered by individual local social planning organizations to establish whether or not the organizations function according to their defined roles in practice; and

- subject to the foregoing, an analysis of the local social planning organizations' revenues and expenditures and the implications arising from current Metropolitan funding policies.

Findings from the Review

(1) Definition of Social Planning

If continued Metropolitan financial support to social planning organizations at both the Metropolitan and local municipal levels is to occur, then both types of organizations must perform important and complementary social planning functions consistent with the existing definition of social planning:

Social Planning is defined as the development of programs and policies to respond to identified community needs. It includes the collection and analysis of information, the preparation of research, discussion and policy papers, community advocacy and education.

While this definition encompasses the activities of social planning organizations at both levels, the review found that the respective organizations follow very different strategies in pursuing social planning. Social planning at the local level involves more direct interaction with and support to service delivery agencies in addressing community and social service issues specifically from a local perspective (e.g., local needs assessment; supporting the establishment of community-based programs). Social planning at the Metropolitan level primarily involves broader research, advocacy and education functions from a Metropolitan-wide perspective (e.g., determining minimum family budgetary requirements; empirical research on racial discrimination in employment). The existing definition of social planning continues to be appropriate, but the terms of reference for social planning support should reflect that the organizations at each level perform different functions appropriate for each level.

(2) Funding Policy

The existence of only one social planning organization within each geographic jurisdiction ensures that the organizations have the opportunity to effectively fullfil their defined functions and operate efficiently. As a result, the review found general acceptance with the current policy that local social planning organizations receive recognition from their area municipal council as the primary social planning organization for the entire municipality.

The existing policy, that the Metropolitan contribution to any local social planning organization would not exceed $10,000.00, was found to be particularly contentious. A financial problem faced by most of the local organizations is the difficulty in securing stable sources of funding which provide sufficient resources to support a core administrative capacity adequate for maintaining and improving organizational development and program delivery. Receipt of a Metropolitan grant, given the $10,000.00 ceiling, although welcomed was identified by the organizations as being insufficient to resolve this problem.

However, the Metropolitan Corporation already allocates significant grant dollars to provide core administrative support to the Metro SPC. The Metro SPC performs Metropolitan-wide social planning functions to the benefit of the entire Metropolitan community. In contrast the activities of the local social planning organizations, as confirmed by the review, while important are primarily of an area municipal nature; the resulting benefits accrue primarily within the respective area municipalities.

It is neither appropriate nor financially feasible for Metropolitan Toronto to assume a role of core funder with respect to both the local organizations and the Metro SPC. Since the grants consist of 100 per cent. Metropolitan dollars, the priority for providing grants should be in support of the Metro SPC which operates programs and provides benefits Metropolitan-wide, consistent with the Metropolitan jurisdiction.

From the Metropolitan perspective, the role of providing core funding to the local social planning organizations would be a suitable initiative for the respective area municipalities. However, a secondary Metropolitan funding role regarding local organizations is still warranted through the provision of limited Metropolitan financial contributions. Although the local organizations and the Metro SPC pursue distinct strategies, linkages exist between their social planning activities. It is important to ensure that these linkages are strengthened and the co-ordination of social planning activities is enhanced. To facilitate this the Metropolitan government should continue to provide financial support to local social planning organizations up to but not exceeding $10,000.00, provided that they receive equal or greater financial support from their respective area municipality.

(3) Eligibility Criteria, Application Procedure, Review and Appeal Process

The existing eligibility criteria, initially approved by Council at its meeting on March 15, 1983, remain valid, and they should continue to be applied during the review of all applications for social planning support. Similarly, the current application procedures should remain in effect. However, as a result of the review, the deadline for organizations to submit applications for social planning support for 1985 will need to be extended to March 31.

Applicants for social planning support, as is the case with all applicants for social services grants, may appeal the subsequent staff recommendations to the Community Services and Housing Committee pursuant to the new procedure adopted by Council on December 4, 1984. The consolidated terms of reference for funding social planning organizations are contained in Appendix I.

Recommendations

It is, therefore, recommended that:

(1) the existing definition of social planning, contained in this report, be re-affirmed;

(2) the Metropolitan government consider applications from the Social Planning Council of Metropolitan Toronto for general operating support provided that it continues to perform a social planning function, as defined, appropriate at the Metropolitan level;

(3) the Metropolitan government consider applications from local social planning organizations for general operating support up to but not exceeding $10,000.00, if these organizations meet the following conditions:

(a) perform a major social planning function, as defined, through a broadly-based independent community board, within the area municipality and appropriate at the area municipal level;

(b) receive recognition from the area municipal council as the primary local social planning organization for the entire municipality; and

(c) receive a level of financial support from the area municipal council which is equal to or exceeds the financial support from the Metropolitan government;

(4) the existing eligibility criteria, application procedure, and review and appeal process, as outlined in Appendix I of this report, be re-affirmed;

(5) the policies adopted in recommendations 1 to 4 above be implemented beginning with the 1985 grant process, with the exception of the deadline for social planning organizations to submit applications for the 1985 grant process which will be extended to March 31; and

(6) the appropriate Metropolitan officials be authorized to take the necessary actions to give effect thereto.

Prepared by:

Shirley Hoy
Director, Policy and Planning Division

Approved by:

J. Richard Picherack
Commissioner of Community Services

APPENDIX I: TERMS OF REFERENCE FOR SOCIAL PLANNING SUPPORT

Grants For Social Planning Organizations

(1) Social Planning Defined

Social Planning is defined as the development of programs and policies to respond to identified community needs. It includes the collection and analysis of information, the preparation of research, discussion and policy papers, community advocacy and education.

(2) Funding Policy

The Metropolitan government will consider applications from the Social Planning Council of Metropolitan Toronto for general operating support provided that it continues to perform a social planning function, as defined above, appropriate at the Metropolitan level.

The Metropolitan government will consider applications from local social planning organizations for general operating support up to but not exceeding $10,000.00, if these organizations meet the following conditions:

(a) perform a major social planning function, as defined above, through a broadly-based independent community board, within the area municipality and appropriate at the area municipal level;

(b) receive recognition from the area municipal council as the primary local social planning organization for the entire municipality; and

(c) receive a level of financial support from the area municipal council which is equal to or exceeds the financial support from the Metropolitan government.

(3) Eligibility Criteria

(a) Legal Entity - The organization requesting a grant must be, or must be in the process of becoming, incorporated as a non-profit organization and should be registered under the Canada Income Tax Act for the purpose of receiving charitable donations.

(b) Community Accountability - The organization must be accountable for its operation and performance to the community through a Board of Directors fairly elected by the general membership.

(c) Board of Directors - The Board must serve in a voluntary capacity and should be representative of the community it serves. The Board must be adequate in numbers and possess the necessary skill to conduct fund-raising, set priorities, and be responsible for the overall management of the organization's resources.

(d) Volunteers - The voluntary component is recognized as an important part of any organization requesting a grant. Volunteers are expected to be actively involved at all levels of the organization appropriate to the organization.

(e) Private Financial Support - The voluntary nature of the organization requesting a grant requires that there be appropriate voluntary financial contributions. "Appropriate" is interpreted to mean that the anticipated level of private fund-raising by the organization is assessed, taking into consideration the size of the organization, its staff and board resources, number of volunteer hours, non-financial contributions, etc.

(f) Operational Efficiency - The operation of an organization must represent economical and effective use of all resources such as property, staff, volunteers, and funds.

(g) Financial Viability - The organization must demonstrate that, with the grant available from Metropolitan Toronto, it is financially viable and able to provide programs and services in question.

(4) Application Procedure

The deadline for applications is January 31st of each year with processing of the applications in the following 3 months. Metropolitan Council approves the grants report by early June, and cheques are issued to the groups by the end of June or beginning of July. Organizations which cannot meet the required deadline, may request an extension of up to 10 working days. This must be requested in writing before the deadline.

Upon receiving the completed application, the Department will immediately send a letter of acknowledgement. It is the applicant's responsibility to ensure that such a letter is received and retained in its possession.

(5) Review and Appeal Process

During the assessment process the Grants Administrator reviews each request for conformity with the approved criteria and policies, meets with representatives of the organization, visits the program where appropriate, and together with staff of the Department of Community Services develops recommendations for funding. The Grants Administrator then advises all successful applicants by telephone of the amount recommended and the date on which the recommendations will be considered by the Community Services and Housing Committee. Those groups which are unsuccessful are advised in writing, with supporting documentation, prior to the time the recommendations are considered by the Committee. Groups which are not

recommended for a grant may request a further meeting with the Grants Administrator and other appropriate staff from the Department prior to the Committee meeting. At that time, both parties have an opportunity to further clarify their positions and thus avoid any possible misunderstandings. However, where an organization remains unsatisfied with the staff recommendation, it may inform the Metropolitan Clerk's Department of its intent to appear as a deputant before the Community Services and Housing Committee.

At the Committee meeting in which deputants appealing staff recommendations appear, the Committee will identify where appropriate a priority list for allocation of the contingency allowance and direct staff to report back with recommendations at the second Committee meeting following. Staff will meet with appellants to determine whether there are justifiable grounds for appeal. Justifiable grounds are considered to be as follows:

(a) the appellant must be eligible for funding under current Metropolitan Council policy;

(b) the appellant must provide documented proof that unforeseen circumstances have arisen since the original application (such as a greater than anticipated need for service, and/or unexpected expense in the provision of the service);

(c) in the case of misinterpretation of the original application, the appellant must clarify the area of contention in writing; and

(d) for those organizations appealing the amount of the grant recommended, the appellant must provide documentation substantiating the proposed use of the additional funds.

Staff will prepare a report to the Committee recommending allocation of the contingency allowance and will inform appellants of the date on which the recommendations concerning the appeals will be considered by the Committee.

2(a)

SOCIAL PLANNING
COUNCIL
OF
METROPOLITAN
TORONTO

185 Bloor Street East
Toronto/Ontario/Canada
M4W 3J3
Tel. (416) 961-9831

January 31, 1985

Kim Ryan, Secretary
Community Services and Housing Committee
Municipality of Metropolitan Toronto
2nd Floor
City Hall,
Toronto, Ontario

Dear Ms. Ryan:

I understand that the report on Funding Social Planning Organizations will be presented at the Community Services and Housing Committee meeting on February 7, 1985.

The Committee of Planning and Coordinating Organizations is an association of the presidents/chairpersons of six municipal-wide non-government planning and coordinating bodies and the Social Planning Council of Metropolitan Toronto. The local planning bodies include Human Services of Scarborough, North York Interagency Council, Etobicoke Social Development Council, East York Interagency Council, York Interagency Network, and Inter-agencies Action Coalition, Toronto (INTERACT).

On behalf of our committee, I have attached copies of a presentation we originally made to Chairman Dennis Flynn in December, 1984. This document should provide background information as to how our members view the need for Metro to support the organization of local social planning bodies in

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A participant in the United Way

the municipalities of Metro.

I anticipate that some of the individual local social planning and coordinating organizations will want to make a deputation to discuss the report.

Due to the short notice a number of member local groups, particularly those without staff, feel that they are unable to internally discuss and prepare for a deputation on February 7, 1985. We respectfully request deferral of the report as a deputation item until the next regular meeting of the Community Services and Housing Committee.

We look forward to your response.

Yours sincerely,

Sheila Churchmuch

Sheila Churchmuch
Chairperson
Committee of Planning & Coordinating Organizations

Encl.

SC:jd

PRESENTATION TO

Community Services and Housing Committee,

Municipality of Metropolitan Toronto

COMMITTEE OF PLANNING AND CO-ORDINATING ORGANIZATIONS (COPCO)

January 30, 1985

- Human Services of Scarborough
- East York Inter-Agency Committee
- Inter Agencies Coalition of Toronto (INTERACT)
- York Inter-Agency Network
- Etobicoke Social Development Council
- Social Planning Council of Metropolitan Toronto
- North York Inter-Agency Council

INTRODUCTION

We welcome this opportunity to inform you of the work of the Committee of Planning and Coordinating Organizations (COPCO), and to present our concerns with respect to the Metro funding policy as it affects support for local planning and coordinating bodies.

Firstly, we would like to describe COPCO

The Committee of Planning and Coordinating Organizations is an association of the presidents/chairpersons of the Metro Social Planning Council and of six municipal-wide non-governmental planning and coordinating bodies. Human Services of Scarborough, North York Inter-Agency Council, Etobicoke Social Development Council, East York Inter-Agency Council, York Interagency Network and Inter-Agencies Action Coalition, Toronto (INTERACT).

It is concerned with common approaches to funders, developing common policies and action around social policy issues in Metro Toronto, and acts as an information exchange among its members. COPCO was established in 1982 in order to influence the development of a 2-tier voluntary (non-governmental) social planning system in Metro.

COPCO activities have centered around issues such as funding for our members, sponsorship of a community forum on group homes, representation to Metro on issues such as 'Neighbourhoods Under Stress', and related matters of common concern in the human services.

COPCO does not in any way replace the work of the Social Planning Council at the metropolitan level. Likewise, COPCO does not assume the planning and development responsibilities of any of our other member organizations, each of whom are governed according to their own constitution or operating rules. It is simply a coordinating committee of the presidents/chairpersons of our organizations as equal partners.

Recent Events

a) Establishment of a Community Research Unit

Funding has recently been received from Health and Welfare Canada, under the Research Group Development Grant fund, for a 2-year project, to develop research expertise in non-governmental social planning/coordinating bodies through a program developed by COPCO. A 'Community Research Unit' has been located, for administrative purposes, at the Social Planning Council. The Unit will perform a variety of functions:

- o conduct research activities such as research design, sampling, data collection, data analysis, report writing;
- o provide advice and consultation on research activities to local planning bodies. This could range from advice on specific projects or research concerns to acting as a project manager for research carried out by a local planning body;
- o conduct training on research methods to local planning bodies, individually or as a group;
- o perform program evaluations as warranted;
- o assist in organizing research programs for local planning bodies on a long term basis;
- o conduct analysis of metro-wide data for applicability to local areas (e.g. analysis of data by planning districts).

We can say at this time that the funding of a Community Research Unit to build the research capacity of our members is a major breakthrough for local planning and coordinating organizations. While the Unit provides only for one senior research consultant and administrative assistance, we are confident that the establishment of the Unit will enable us to develop a research program for our agencies that provides a better basis of our planning.

We also look forward to the senior researcher relating closely to Metro staff over the period in which the Unit is to operate.

b) Election of a new Chairperson

In the past few months, we have had election of a new chairperson, replacing the Rev. Eilert Frerichs who has completed his term. Sheila Churchmuch, President of Human Services of Scarborough is the new chairperson for 1984-5. Meetings of COPCO are being held on a regular basis, rotating in each of the municipalities from which COPCO members are drawn. These site visits are allowing members to appreciate the needs, issues and activities within each of the local communities.

So much for bringing you up to date on recent events regarding COPCO. We now want to make some comments on changes that we perceive to be necessary to make in the Metro policy on Funding Voluntary Community Services (approved February 23, 1983) as it affects our COPCO member organizations.

We appreciate that a review of the policy regarding funding is now being undertaken by the Community Services Department. While each of our organizations will have its own unique perspective, we do share a number of common concerns regarding funding support for non-governmental social planning and coordinating bodies. We wish to address these concerns in the remainder of this report. We might add that the concerns have also been shared with Metro staff who are conducting the review of the policy on support to voluntary organizations.

METRO SUPPORT FOR VOLUNTARY SOCIAL PLANNING

Current Metro Funding Policy

The Metro funding policy provides for consideration of general support if local social planning organizations meet 3 conditions:

a) perform a major social planning function on an area municipal basis, through a broadly based independent community board;
b) receive recognition from the area municipal council as the primary local social planning organization for the entire municipality.
c) receive a level of financial support from the area municipal council which is equal to or exceeds the financial support from the Metro government. Metro's contribution would not exceed a maximum of $10,000 per local organization.

Social Planning is defined in the existing policy as: "the development of programs and policies to respond to identified community needs. It includes the collection and analysis of information, the preparation of research, discussion and policy papers, community advocacy and education."

Comments on Current Policy

The adoption of the current Metro policy to support local social planning organizations was a welcome and significant step to assist us in the development of a voluntary social planning system at the local level. Our organizations recommended this in a position statement (Metro Funding of Organizations for Social Development at the Metro and Borough levels) in August 1982. Our comments on the current policy are made in the spirit of cooperation in making changes that would improve the funding policy to reach this objective of developing a strong non-governmental social planning system.

Of the seven organizations associated with COPCO, four of these now receive some funding from Metro - the Social Planning Council of Metropolitan Toronto, and three local organizations - Etobicoke Social Development Council, North York Interagency Council and Human Services of Scarborough. While we

appreciate this funding, we are finding that the maximum of $10,000 Metro contribution per local organization is not sufficient to help meet our resource needs. Some of us are also in need of "bridge funding" from time to time due to the different payment periods of funding bodies.

There are three other members of COPCO who do not qualify for Metro funding under the existing policy, but who are in need of some developmental funding as they move toward assuming social planning responsibilities in their municipality. This group includes the East York Interagency Council, Inter Agencies Action Coalition of Toronto (INTERACT), and York Interagency Network. These organizations do not as yet have the capacity to engage in all the functions required of a full fledged voluntary social planning body.

They do not have community boards, but each does have a broadly-based representative structure. In each case, they allow for open access to their organizations by community agencies and associations and represent the participation of a wide number of such groups which are serving people and their needs.

We agree that the 'ideal' for a local social planning body should be the performing of all the required functions under an independent community board. But we believe that three of our member organizations are in a preliminary developmental stage and need support in moving toward these objectives.

CONCLUSION

We are grateful for Metro's recognition and support of our efforts to develop a non-governmental social planning system.

Our organizations are in varying degrees of development at the local level. If we are to build an effective non-governmental social planning system, with a strong Social Planning Council at the Metro-wide level and strong social planning organizations at the local level, we will require further assistance from the Metro government. It is our contention that the Metro contributions should ~~at least~~ more than match that of the local municipality to social planning and coordinating organizations. In the case of those municipalities, where local bodies have not reached a level of organization where they can be recognized as the primary local social

organization for the entire municipality, Metro should consider application for funding which would allow these organizations to develop to a point where they are eligible under existing policy.

Your further support will assist us to become "full partners" in social planning with you to work toward meeting the human service needs of people.

2(b)

City of Etobicoke

CIVIC CENTRE
ETOBICOKE, ONTARIO
M9C 2Y2
(416) 626-4100

OFFICE OF THE MAYOR

February 4th, 1985.

Chairman and Members,
Metro Community Services & Housing Committee,
Clerk's Department,
Municipality of Metropolitan Toronto,
City Hall,
Toronto, Ontario.
M5H 2N1

Ladies & Gentlemen:

It is my understanding that the Community Services and Housing Committee is reviewing the granting policy for local planning organizations.

When this policy was first adopted in 1983, a $10,000 ceiling was placed on local groups and an indication was made that this ceiling was to be reviewed.

The $10,000 ceiling was not considered to be adequate at the time, but it was felt that the review would result in more positive financial support.

There appears to be some justifiable concern that in fact no change in the ceiling will be enacted, and I would therefore like to voice my concern about this issue, on behalf of the Etobicoke Social Development Council.

Etobicoke Social Development Council is recognized as the social planning/development organization of Etobicoke.

The Council has a long standing history of activities which have resulted in the development of a broad range of social and support services. This agency not only keeps the community informed about local concerns, but also helps to identify issues of a Metro-wide nature and applies these issues locally.

Etobicoke Social Development Council supports the efforts of local organizations and has, as well, developed its own projects and programs which are given over to appropriate community based boards once they are successful.

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Etobicoke Council has demonstrated strong support to ESDC in the most recognizable way possible - through its grants program - and while it is our intention to continue this support, local resources are limited, in that Council seeks to provide funding to other service agencies and to supplement the limited funding made available to them from other sources.

The report which is before the Community Services and Housing Committee appears to give no consideration to the fact that local social planning/development organizations have limited access to funding sources, that these oganizations face the same types of yearly cost increases experienced by other organizations including Metro Toronto Social Planning Council, and that their need for funding does not remain static.

Clearly there must be a more realistic granting process put in place, one which recognizes that Metro Toronto Social Planning Council generally does not speak to the needs of local area municipalities, and that local, recognized social planning/development organizations do speak to local issues and as such should be recognized by Metro with appropriate grants.

I would therefore strongly recommend that the Community Services and Housing Committee set a more appropriate ceiling of $15,000 for local planning organizations, and give consideration to future inflationary increases.

Yours sincerely,

Bruce Sinclair, Mayor,
City of Etobicoke.

GBS/pp

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HUMAN SERVICES OF SCARBOROUGH
91 Eastpark Boulevard, Scarborough, Ontario M1H 1C6
Telephone: 439-5806

February 5, 1985

Chairperson
Metro Community Services
and Housing Committee
Metro Clerk's Department
2nd Floor, New City Hall
Toronto, Ontario
M5H 2N1

Dear Sir/Madam:

RE: SOCIAL SERVICE GRANTS REVIEW
SOCIAL PLANNING BODIES

I am writing in response to a letter that Human Services of Scarborough received from Shirley Hoy, Director of Policy and Planning.

In response to this letter we wish to indicate our very deep concern that it is being recommended that the ceiling of $10,000 placed upon the Metro contribution to social planning organizations be continued for the year 1985. This ceiling, if approved by Metro Council, will not have changed in three (3) years.

Human Services of Scarborough was formed as a result of the Metro Social Planning Council's Report, Metro Suburbs in Transition. As you are aware this report documented in detail the dramatically changing life-styles of people who reside in the suburbs. It also documented a significant lack of social services in many areas. Scarborough's growth in the past decade has meant in many cases the rapidly growing needs for human services have not been meet by a comparible growth in the development of these services. In order to meet this need to the best of our ability Human Services of Scarborough has over 100 volunteers who contribute greatly in both time and support so that our Board may identify human service needs within Scarborough, plan for the development of services to meet these needs, and assist in the implementation of services where needed.

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We would also request that you consider the impact of inflation over the past three (3) years which has greatly reduced the actual purchasing power of the money received.

We understand you are faced with competing priorities in your deliberations, however, we wish to emphasize that your contribution has been, and continues to be a significant value to us, and we are writing to request that in your pending review of this policy you seriously consider raising the current ceiling of $10,000 to reflect our continuing needs in the City of Scarborough.

Sincerely yours,

Sheila Churchmuch

Sheila Churchmuch
President

SC:rk

2d.

The Municipality of
Metropolitan Toronto

Metropolitan Community Services Department
City Hall, East Tower, 5th Floor
Toronto, Ontario, Canada M5H 2N1
Telephone: (416) 947-8302

J. Richard Picherack, Commissioner

February 13, 1985

To: Community Services and Housing Committee

Origin: Commissioner of Community Services

Subject: Addendum to Report to Committee on Review of Grant Policy for Social Planning Organizations

On February 7, 1985, Community Services and Housing Committee had before it the above-mentioned report from the Community Services Department. Committee deferred consideration of this report until its meeting on February 21, 1985.

At the same time Committee requested that the Department provide summaries on the budgets of the social planning organizations currently funded by Metropolitan Toronto, including the relative impacts of Metropolitan grants, and on the activities conducted by the organizations. This information is attached in Appendix I and II respectively. Accurate financial data are not available for those organizations not currently funded.

For information purposes, the Department has also summarized other options for a Metropolitan grants policy for social planning organizations, including their advantages and disadvantages, previously examined in the course of the Department's review. These options, contained in Appendix III, should be taken into account by the Committee when considering the funding policy recommendations in the report on the Review of the Grant Policy for Social Planning Organizations.

Prepared by:
Shirley Hoy
Director of Policy and Planning Division

Approved by:
J. Richard Picherack
Commissioner of Community Services

APPENDIX I

SUMMARY OF BUDGETS OF SOCIAL PLANNING ORGANIZATIONS

(1) Social Planning Council of Metropolitan Toronto

Major Sources of Income*	1983 Actual (% of Budget)	% Change 1983-84	1984 Estimate (% of Estimate)
United Way	$ 475,131.00 (73.6%)	+4.0%	$ 494,136.00 (72.6%)
Federal Government	$ 38,804.00 (6.0%)	-100%	-
Provincial Government	-	-	-
Area Municipalities	$ 4,500.00 (0.7%)	-100%	-
Other	$ 63,241.00 (9.8%)	+88.3%	$ 119,057.00 (17.5%)
Metropolitan Grant	$ 63,720.00 (9.9%)	+5.0%	$ 66,906.00 (9.8%)
TOTAL	$ 645,396.00 (100.0%)	+5.4%	$ 680,099.00 (100.0%)

*Excludes Trust Funds

(2) Etobicoke Social Development Council

Major Sources of Income	1983 Actual (% of Budget)	% Change 1983-84	1984 Estimate (% of Estimate)
United Way	$ 30,759.00 (48.4%)	+4.0%	$ 32,000.00 (44.5%)
Federal Government	-	-	-
Provincial government-	-	-	-
Area Municipality	$ 14,000.00 (22.0%)	+24.6%	$ 17,450.00 (24.2%)
Other	$ 8,835.14 (13.9%)	+41.7%	$ 12,520.00 (17.4%)
Metropolitan Grant	$ 10,000.00 (15.7%)	0%	$ 10,000.00 (13.9%)
TOTAL	$ 63,594.14 (100.0%)	+13.2%	$ 71,970.00 (100.0%)

(3) Human Services of Scarborough

Major Sources of Income	1983 Actual* (% of Budget)	% Change 1983-84	1984 Estimate* (% of Estimate)
United Way	-	-	-
Federal Government	$ 20,000.00 (36.0%)	-100%	-
Provincial Government	-	-	$ 29,500.00 (36.8%)
Area Municipality	$ 20,000.00 (36.0%)	+50.0%	$ 30,000.00 (37.4%)
Other	$ 5,547.00 (10.0%)	+93.0%	$ 10,703.00 (13.3%)
Metropolitan Grant	$ 10,000.00 (18.0%)	0%	$ 10,000.00 (12.5%)
TOTAL	$ 55,547.00 (100.0%)	+44.4%	80,203 (100.0%)

* Includes Special Project Funding

(4) North York Inter-Agency Council

Major Sources of Income	1983 Actual*** (% of Budget)	% Change 1983-84	1984 Estimate**** (% of Estimate)
United Way	-	-	-
Federal Government**	$ 19,649.00 (5.1%)	+169.7%	$ 53,000.00 (16.0%)
Provincial Government**	$ 249,026.00 (64.3%)	-7.8%	$ 229,542.00 (69.3%)
Area Municipality	$ 20,000.00 (5.2%)	+25%	$ 25,000.00 (7.5%)
Other	$ 88,764.00 (22.9%)	-84.6%	$ 13,698.00 (4.1%)
Metropolitan Grant	$ 10,000.00 (2.6%)	0%	$ 10,000.00 (3.0%)
TOTAL	$ 387,439.00 (100.0%)	-14.5%	$ 331,240.00 (100.0%)

** Entirely Project Specific Funding
*** Year Ending March 31, 1984
**** Year Ending March 31, 1985

APPENDIX II

SUMMARY OF ACTIVITIES OF SOCIAL PLANNING ORGANIZATIONS

(1) Definition of Social Planning

Social Planning is defined as the development of programs and policies to respond to identified community needs. It includes the collection and analysis of information, the preparation of research, discussion and policy papers, community advocacy and education.

(2) Distinction in Local and Metropolitan Social Planning Activities Conducted at the Metropolitan and Local Levels

Social planning at the local levels involves more direct interaction with and support to service delivery agencies in addressing community and social service issues specifically from a local perspective. Social planning at the Metropolitan level primarily involves broader research, advocacy and education functions from a Metropolitan-wide perspective.

(3) Examples of Activities Conducted by Applicant Organizations

(a) Social Planning Council of Metropolitan Toronto - Guides for Family Budgeting, Racial Discrimination in Employment, Social Spending Cutbacks, Family Life Initiatives Project, Promoting Development of Self-Help Organizations, access to Multicultural Services, Privatization, supports for Young Families.

(b) Etobicoke Social Development Council - responding to new legislation on guardianship, developing a directory of services for women, and organizing a task force on pornography; ongoing services include information sharing and the co-ordination of services in Etobicoke.

(c) Human Services of Scarborough - developing a forum on issues affecting youth; sponsoring of multicultural nights; investigating issues affecting seniors such as home support, housing, transportation, services to immigrant seniors, and the development of intergenerational programs; providing forums and advocating for programs and services for women; and the publication of a bi-monthly newsletter.

(d) North York Inter-Agency Council - continued participation in Joint Task Force on Neighbourhood Support Services, participation in the Human Services Advisory Council which advises North York Council on issues affecting the community, and continued response to issues relating to services for seniors in North York.

(e) East York Inter-Agency Committee - co-ordinating a public forum (to become an on-going activity) and a series of meetings between funders and service providers to determine human service needs.

(f) Inter-Agency Action Coalition of Toronto - services will include the sharing of information, the identification of City-wide issues, advocating to appropriate levels of government for policy and program changes and the development of innovative and preventative services.

APPENDIX III

FURTHER OPTIONS FOR POLICY ON METROPOLITAN GRANTS TO SOCIAL PLANNING ORGANIZATIONS

(1) Cost-of-Living Adjustment Option

Description of Funding Policy

Under this option the value of the grants to eligible local social planning organizations would be increased annually at appropriate rates. Depending on actual circumstances, for example, the rate of increase could be consistent with the increase in the budget for social services grants or with the annual increase in the consumer price index. Inflationary increases to the $10,000.00 grant ceiling for 1985 grants would be calculated from 1983 (the year the ceiling was introduced) according to the following schedule:

Ceiling in 1983 (Base Year)		$10,000.00
6% Increase from 1983 to 1984 plus 3.5% Increase from 1984 to 1985, Compounded	+/-	$ 1,000.00
Maximum Value of Grants in 1985		$11,000.00

Advantages

- The issue of inflationary impacts on the budgets of organizations would be resolved.
- The existing Metropolitan roles - partial core funder of the Social Planning Council of Metropolitan Toronto (Metro SPC) and secondary funder of local social planning organizations through limited financial contributions -would be largely preserved.
- Will not require further staff reviews of ceilings on these grants.

Disadvantages

- Implementation would entail a supplementary budget request of $6,000.00 for 1985; together with the additional request of $30,000.00 in 1985 for the three local organizations not currently funded, in anticipation of their meeting the eligibility criteria, a total increase of $36,000.00 over the respective 1984 budget would be required.
- The outlook for Metropolitan Toronto is that the recent period of financial restraint will continue at least for 1985; therefore, it is unlikely that there would be substantial increases in the Metropolitan grants budget; this means that increased grant dollars to social planning organizations would be at the expense of grant dollars otherwise provided to general social services agencies.
- Future budgets will need to reflect the annual inflationary adjustments in these grants.

(2) Increased Ceiling Option

Description of Funding Policy

Under this option the current ceiling would be raised to a level which substantially responds to the need of the local organizations to secure stable sources of adequate core funding. Effective for the 1985 grants process, the Metropolitan government would consider applications from local social planning organizations for general operating support up to but not exceeding $15,000.00, if these organizations meet the prescribed conditions and criteria.

Advantages

- Substantially addresses the core funding requirements of the local social planning organizations.

Disadvantages

- Implementation would entail a supplementary budget request of $30,000.00 for 1985; together with the additional $30,000.00 already requested in 1985 for the three organizations not previously funded, a total increase of $60,000.00 over the respective 1984 budget would be required.

- The outlook for Metropolitan Toronto is that the recent period of financial restraint will continue at least for 1985; therefore, it is unlikely that there would be substantial increases in the Metropolitan grants budget; this means that increased grant dollars to social planning organizations would be at the expense of grant dollars otherwise provided to general social services agencies.

- Future budgets also will need to allocate sufficient resources to give effect to this increased ceiling.

- Despite the raised ceiling, after several years of inflationary impacts on the budgets of the organizations, the organizations will request further increases in the ceiling (requiring further staff reviews).

- This option would not be entirely consistent with the existing Metropolitan role of secondary funding source in providing limited financial contributions to the local social planning organizations; the provision of more substantial funding would redefine the role and responsibilities of the Metropolitan Corporation in this area.

- Significant increases in the value of grants to local social planning organizations - a secondary Metropolitan funding priority compared to Metropolitan-wide programs/agencies - may be seen as a precedent by other locally oriented organizations, such as neighbourhood information centres which are not currently funded.

(3) Reallocation Option

Description of Funding Policy

Under this option funds would continue to be budgetted for the social planning support component of the social services grants program on the same basis as in the past. However, within this component a significant portion of the funds that would otherwise be allocated to the Metro SPC would be instead diverted to the local social planning organizations. The extent of the reallocation would be determined during the course of the annual grants administration process according to the relative needs and merits of the individual organizations.

Advantages

- o Substantially resolves the core funding requirements of the local social planning organizations.
- o Does not require supplementary budget request.

Disadvantages

- o Financial support for Metropolitan-wide programs would be reallocated to support locally oriented projects and activities.
- o The problem of securing stable sources of adequate core funding simply would be transferred from the local organizations to the Metro SPC.
- o This option is inconsistent with the existing Metropolitan role of providing partial core funding support to the Metro SPC; significant reductions in the financial support provided to the Metro SPC would result in a shift to program based funding from the current core funding.